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ABSTRACT

The second of three documents of a project designed to help North Carolina counties plan community based status offender programs presents a general planning model. An overview traces five steps of the planning decision process, from determining the importance of status offender needs to the county to making program funding decisions based on evaluation data. Details of the 16 step planning decision model are given in two tracks--for the full task force and for a technical committee. The document concludes with sample worksheets for calculating the value of a program being considered for funding and for listing major variables in the final selection of programs. (CL)

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Center for Urban Affairs and Community Services
North Carolina State University
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STATUS OFFENDER PROJECT
PLANNING DECISION WORKBOOK

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The Urban Affairs staff who have contributed significantly to this project include: Jim Davies, Pat Miller, and Emerson Snipes, Project Managers; Bill Freyer, Jim Fletcher and David Twine, Computing Team; Ann DeMaine, Training Coordinator; John Condrey, Graduate Assistant; Bonnie Denkins, Donna Hollis, Sandra Mills and Paula Taylor, Administrative Support Staff; and Lenora McQuillan, Project Secretary. Their efforts are greatly appreciated.

Appreciation should also be extended to those contributors to the theories of decision analysis and planning for multiple objectives in whose intellectual footsteps this project has followed. Ralph Keeney, Howard Raiffa, Ward Edwards, Peter Gardner, Marcia Guttentag, Kenneth Hammond and Leonard Adelman have paved the way conceptually for the work done on the Planning Decision Model presented here. The responsibility for any errors of interpretation, however, rests squarely with the current authors.

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PREFACE

The passage of H. B. 456 in 1975 by the North Carolina General Assembly mandated that status offenders no longer be committed to training schools. Additionally, counties were given the responsibility to provide alternative programs to meet the needs of juveniles who have committed status offenses. In response to this mandate, the Community-Based Alternatives (CBA) Section of the Department of Human Resources contracted with the Center for Urban Affairs and Community Services (CUACS) at North Carolina State University to conduct a two-part project designed to assist counties in planning community-based programs. The County Data Reports, Service Resources Workbook, and Planning Decision Workbook are products of that effort.

A fundamental problem facing counties planning programs was the lack of adequate information about the needs of both status offenders and youth "at risk" of entering the juvenile justice system. The first phase of the project was designed to address this problem through a statewide needs assessment, which was conducted between July and October, 1977. Survey methodology and data results are reported in the County Data Reports.

An accurate profile of the needs of these youth is only one component of the planning process. Another component of rational planning is an evaluation of existing and proposed new services and programs for status offenders and youth "at risk." The Service Resources Workbook instructs the user in gathering this assessment information.

Task forces for the most part have had little exposure to setting goals or recommending programs to meet specific goals. In an effort to provide technical assistance to these groups, a Planning Decision Model which uses the information contained in the County Data Reports and gathered in the Service Resources Assessment has been developed at CUACS. The planning process is documented in the Planning Decision Workbook. The CBA Section has worked closely with CUACS in developing the Planning Decision Model, and will provide on-site technical assistance in using the model to local task forces.

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I. INTRODUCTION

The 1975 passage of House Bill 456 by the General Assembly placed a large responsibility on county task forces to provide locally based programs for status offenders.¹ This responsibility has been frustrating for many counties since they have been forced to plan and fund programs without sufficient information about the needs of status offenders and of youth "at risk" of entering the juvenile justice system. With the completion of a statewide needs assessment of status offenders and the publication of County Data Reports for each county in North Carolina, this problem has been almost totally solved. However, an accurate picture of the problems of, and programmatic recommendations for, status offenders was only part of what was needed for counties to fulfill their mandate under House Bill 456.

Purpose and Scope of the Planning Decision Workbook

North Carolina had a clear need for a process to provide each county with a documented, defensible plan for funding status offender programs which incorporated available, relevant data. Rational planning for status offenders requires an evaluation of existing, proposed, and potential new programs in the county. It also requires a method for organizing this information so that responsible funding decisions can be made. The activities of this Planning Decision Process are:

- 1) Discovery of what a county wants in a status offender program; that is, what makes a program desirable to the county.
- 2) Comparison of different programs in terms of how well they deliver what the county wants from them. This comparison enables a county to ask if one program is more desirable than another.
- 3) Comparison of the costs of competing programs.
- 4) Organization of all the information which has been gathered into a format which facilitates and encourages high-quality funding decisions.

¹ Generally, youth under 18 years of age who have committed "status offenses," i.e., acts or conduct which are declared by statute to be legal offenses, but only when committed or engaged in by a juvenile under 18.

County task forces making decisions about service programs for status offenders encounter numerous difficulties as they try to take into account the complexities of these important decisions. An important situation, one in which people's lives are involved, introduces a requirement for an explicit and logical process which structures community decision-making. Reliance on intuitive judgments and "best guesses" might be acceptable in making some decisions, but when important issues are confronted and public money is being spent, something better is needed. What is needed is an objective decision-making process; decisions based on hard data; and clear documentation of the steps involved in making those decisions.

North Carolina status offender task forces, as community volunteer groups, need practical planning procedures which non-planners can learn with a minimal amount of training and can use with a minimal expenditure of time. The Planning Decision Workbook attempts to meet this need. It provides the county task force with a process for developing a defensible, needs-based plan for allocating Community-Based Alternatives (CBA) funds among competing status offender programs. The workbook includes:

1. A background to planning and decision-making in the social arena and a description of the Planning Decision Process, which breaks down the key decision-making stages for developing a status offender funding plan into manageable components (Chapter I).
2. A detailed, step-by-step description of the Planning Decision Process (Chapter II).
3. Detailed, step-by-step instructions for completing two of the major forms involved in the Planning Decision Process (Chapters III and IV).
4. A discussion of alternatives and recommendations for using the output of the Planning Decision Process which might be used in a particular county (Chapter V).

This workbook has been designed to be a "working document" which will serve the counties in a practical way in developing plans for local status offender programs in the future. The emphasis in this

workbook has been on the practical rather than the academic. Although an attempt has been made to explain the planning approach and to give the logic behind each stage of the process, no attempt has been made to provide full justification or documentation for each step.

The Planning Decision Process presented here is not the only process a county could use in developing plans for funding status offender programs. It has been developed as a general model which should be usable in every county of the state. A number of local variations on this basic model can be used to produce valid funding decisions for a county. Each county, working with its CBA Field Consultant, can use this workbook as a flexible guide in developing a funding plan which meets the requirements of that community.

Introduction to Planning

The need for structured methods of program planning did not arise in a vacuum. It was a response to the history of social planning in this country and its attendant problems over nearly two decades.

Problems in the Past. During the nineteen sixties, the federal government channeled large sums of money into social programs. These programs, however, did not achieve their intended results. With this failure came a realization of the necessity for human services planning. Social research technology--including such concepts as control groups and human behavior theories--was not able to handle the extra demands of accountability being made for human services programs: accountability to show that there was a need for each program funded. Social research techniques were often inappropriate to human services planning and too expensive and difficult to implement in local communities. Planners found that a lot of money was available for human services, and that a real need for these services existed, but no effective means were available to best allocate funds to meet the need.

Solutions for the Future. A method of making planning decisions and documenting these decisions is necessary. Both the public and the law demand that documentation for and justifications of the reasons why money is channeled into particular programs be provided. Program planners are well versed in planning the details of program implementation,

but not in structuring the decisions that go into determining what programs to implement.

Social planning theorists are now advocating a more practical substitute to the rejected social research technology of the sixties. They advocate the use of the best possible data available and the use of reasoned estimates when no data are available. These data and estimates can then be used in a decision-making model which structures the use of these data. This acceptance of incomplete data and estimates is part of the incremental approach that is now being taken in upgrading the planning of human services programs.

The status offender Planning Decision Process is representative of the decision-making models that are being developed to structure decisions based upon data and careful estimation.

County and DHR Roles in Decision-Making. Status offender program planning in North Carolina involves two governmental units--the counties and the Department of Human Resources. The Planning Decision Process will strengthen the roles of these two units. In much human service planning across the country, federal and state governments allocate monies to counties, and either impose strict spending restrictions on the counties' use of funds or provide few useful guidelines to help local governments make good spending decisions. The counties make local allocation decisions and spend the money. This traditional relationship is displayed in Figure 1a. County participation in the development of spending guidelines, and state-level knowledge of the rationale for each county's use of the funds are both lacking. Data needed to enhance the coordination between the state-level funding organization and the county planners have not been available.

The status offender Planning Decision Process provides these data. The data-based relationship between the Department of Human Resources, the counties, and the task forces is displayed in Figure 1b. Using this process, the state provides the money for status offender's programs and general, flexible guidelines for the counties to use in making funding decisions. The counties use these guidelines, status offender needs and program evaluation data, and their own judgments to set priorities and

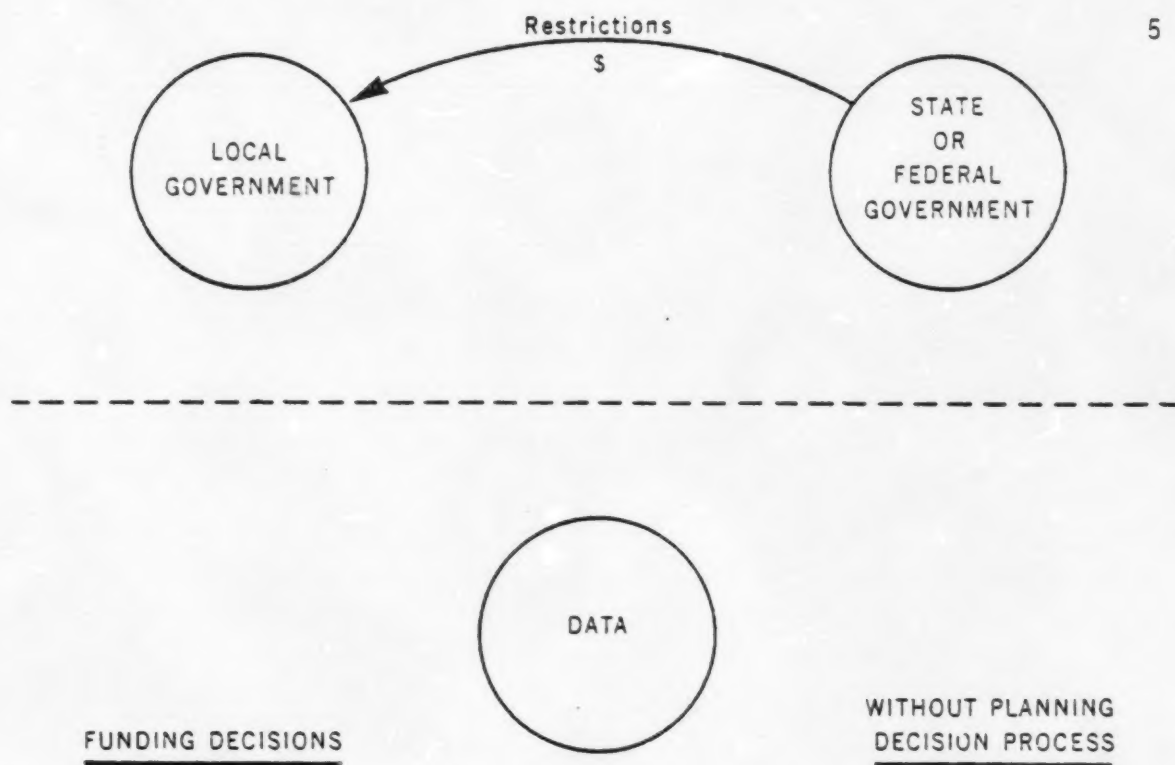


Figure 1a.

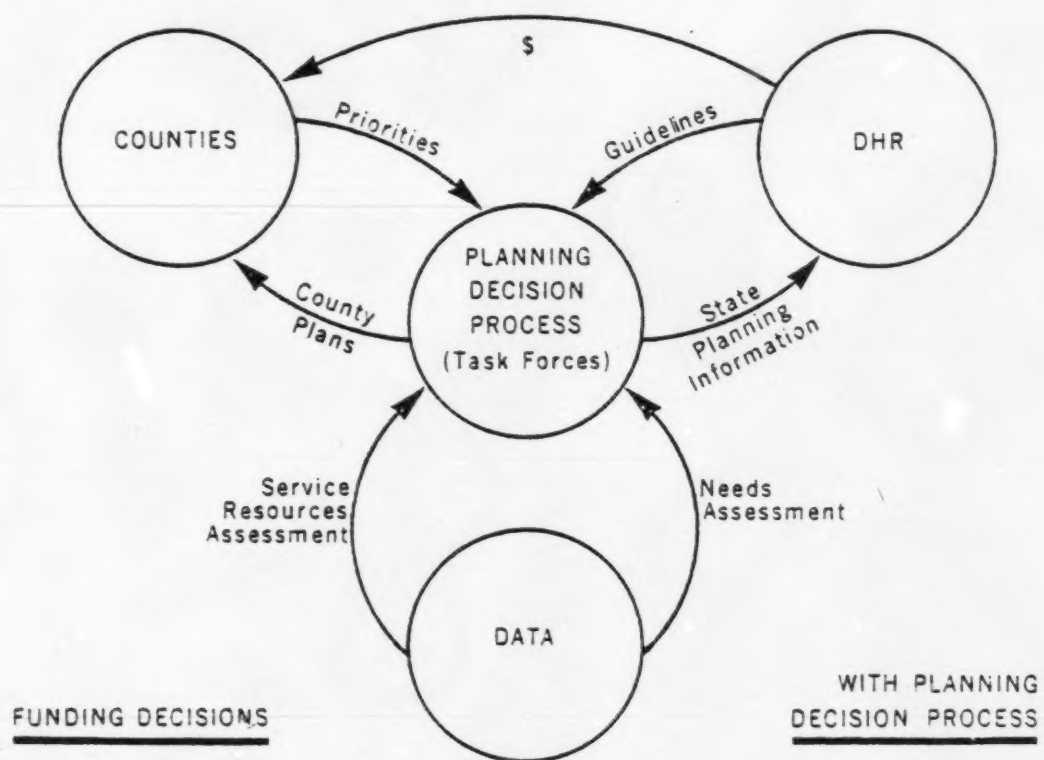


Figure 1b.

arrive at a county plan for funding local programs. The counties provide the state with data on their priorities for funding and on the information that was considered by them in setting those priorities. The Department of Human Resources uses this information in producing a statewide plan, presenting documentation to the legislature for future state appropriations for status offender programs, and in establishing spending guidelines for the following year. The state also allocates future funds to the counties based upon information from the counties about the requirement for these funds.

The Planning Decision Process, by providing a mechanism by which the Department of Human Resources and the counties can exchange information, encourages cooperative planning for status offender programs.

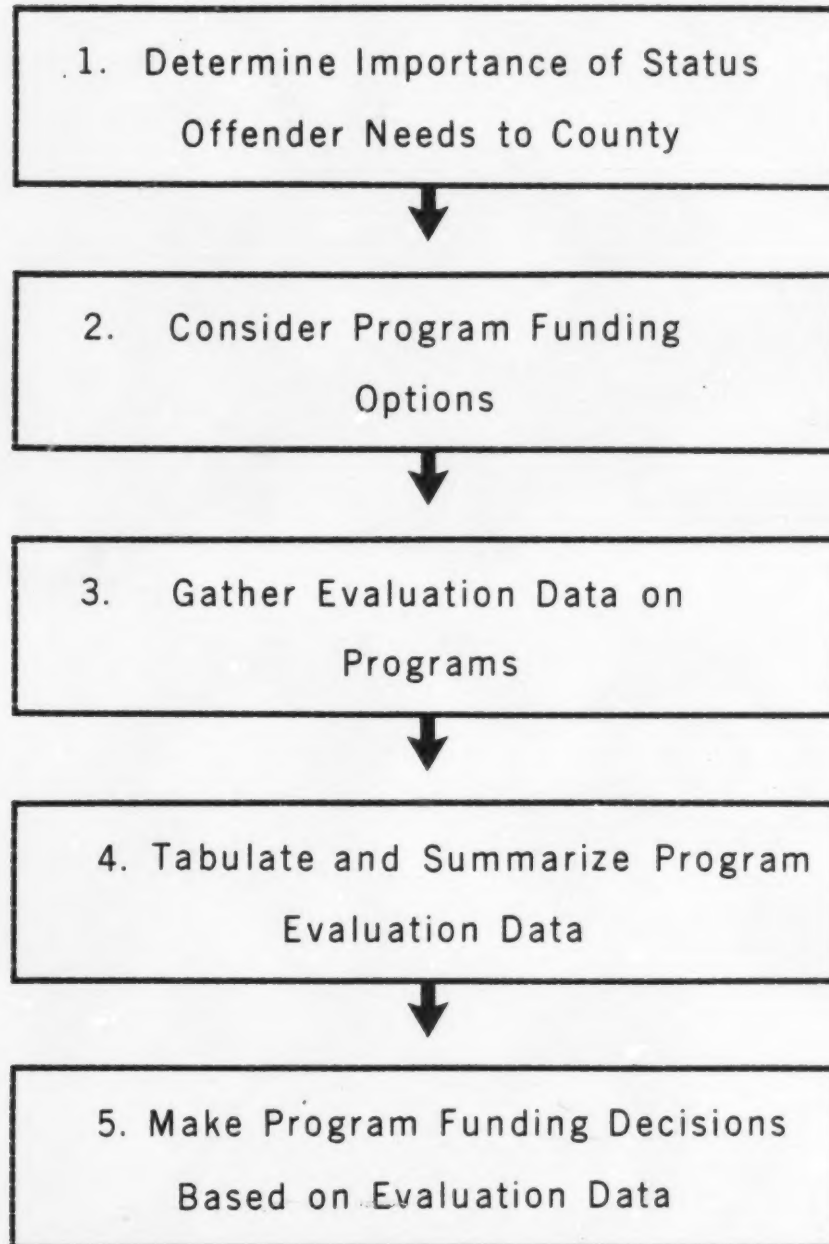
Overview of Planning Decision Process

The Center for Urban Affairs and Community Services has developed a Planning Decision Process for use by local task forces in planning the funding for community-based programs for status offenders. This process is composed of five basic stages, displayed in Figure 2. The first stage is determining the importance of status offender needs to the community. In the second stage, the task force considers all available program funding options. During the third stage, evaluation data on the programs being considered are gathered. In the fourth stage, these program evaluation data are tabulated and summarized. In the final stage, the task force makes program funding recommendations based on the evaluation data.

Stage 1. Determine Importance of Status Offender Needs to County.

The results of the Statewide Needs Assessment of Status Offenders and Youth at Risk identified six basic needs as major contributing factors to status offender behavior. They are: 1) the need for acceptable social and interpersonal values, 2) the need for appropriate education, 3) the need for appropriate living situation, 4) the need for mental health, 5) the need for physical health, and 6) the need for recreation. The Department of Human Resources, Community-Based Alternatives Section determined that, based on the data, these are the needs which should be met

OVERVIEW OF PLANNING DECISION PROCESS



for status offenders in North Carolina. In the first stage of the Planning Decision Process, each county assigns its own priorities to these needs in order to determine where the county's efforts and resources should be placed. Data found in the County Data Report should be used for assistance in setting these priorities.

Stage 2: Consider Program Funding Options. In the second stage of the process the task force explores the various program funding options available to the county. A wide array of options is open to a particular county, and the task force needs a method for narrowing down the available choices to a manageable size for evaluation. One method of accomplishing this task is through the use of data on the demand for various program types gathered in the Status Offender Needs Assessment.

Stage 3: Gather Evaluation Data on Programs. Stage three consists of actually gathering program evaluation data on specific programs. These data include the number of clients served and program costs. Task force members gather this information using the Service Resources Assessment process outlined in the Service Resources Workbook. By gathering information on its own programs, the county task force tailors the Planning Decision Process to the specific characteristics of its community.

Stage 4: Tabulate and Summarize Program Evaluation Data. In the fourth stage, all data are organized so that differences between programs are clear. The relative value of each program is determined. Value is a factor combining the desirability of a program and the cost of that program to the community. Also important in this process are statewide needs assessment data on the estimated effectiveness of various types of programs. In future years an evaluation procedure will be developed for all funded programs so that actual performance figures for a specific program, rather than statewide estimates, can be used for planning.

Stage 5: Make Program Funding Decisions Based on Evaluation Data. In the final stage of the planning process, each county makes program funding recommendations based on all gathered data, as well as other important non-quantitative information. The purpose of the Planning Decision Process is to organize a wide array of evaluation data into a

format which enables the task force to determine the value of a specific program to its community. Determination of these values organizes and simplifies the task for choosing programs for funding.

In Chapter II, these five stages are further detailed into the sixteen individual steps in the Planning Decision Model.

Conducting This Process - Who Should Participate and How

The Planning Decision Process and this workbook are designed to be used by each county's task force in putting together its status offender program funding recommendations. The CBA Field Consultants will be available to provide each task force with assistance in conducting the Planning Decision Process.

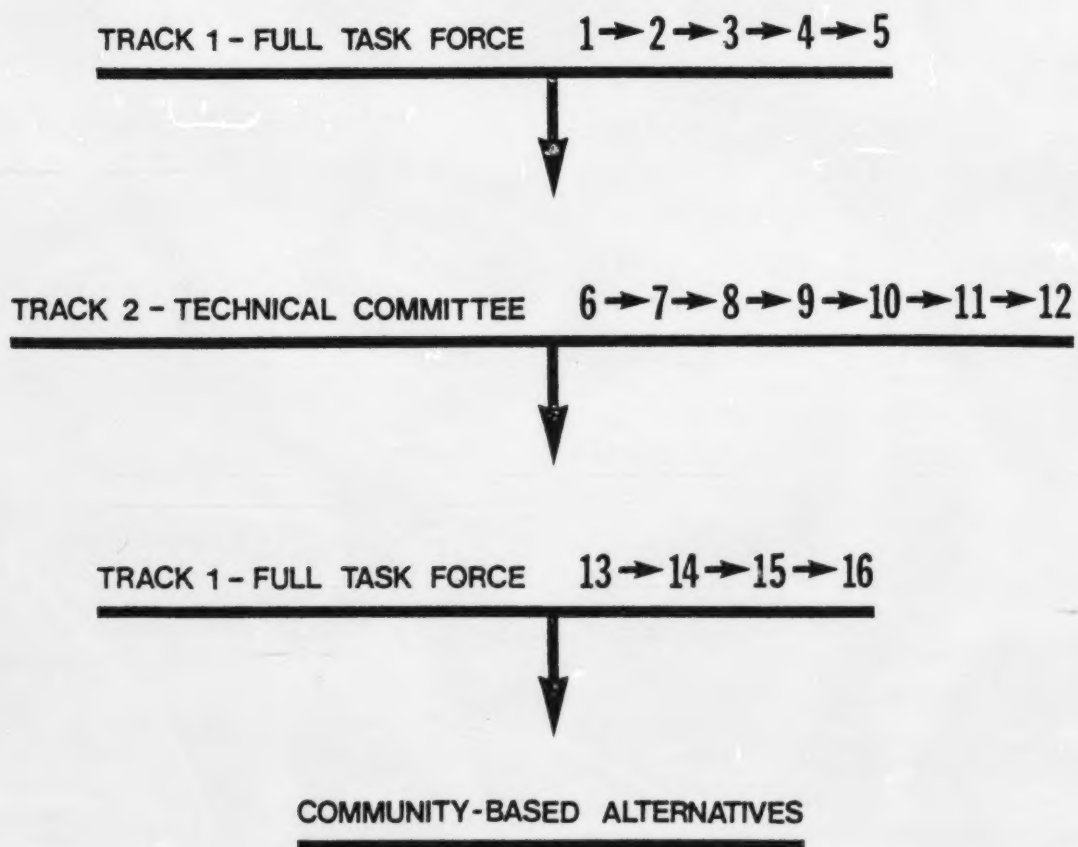
The sixteen-step Planning Decision Model is divided into two tracks, shown in Figure 3. The first track includes the steps involved in stages 1, 2, and 5 of the Planning Decision Process. This track is designed to be accomplished by the task force as a whole during its regularly scheduled meetings. The subjective, policy-making steps of the process, which should be completed by the entire task force, are included in this track.

The second track, that of collecting data and making computations, is designed to be accomplished by a committee of the task force. This technical committee should be composed of task force members who are willing to devote a few hours a month outside of task force meetings to conducting these steps. Technical committee members do not need to have any special mathematical knowledge to conduct the simple data computations of the process.

The size of the technical committee will be determined by the size of the county and the number of programs to be surveyed. Small counties should plan for a two-to-three-member committee; large counties may want a slightly larger group of three-to-six members.

The task forces send their recommendations for program funding to CBA Field Consultants for their region. The Field Consultants will forward the county recommendations to the CBA central office. The activities of the CBA staff are not defined in this document but will include

STATUS OFFENDERS PLANNING DECISION MODEL



incorporating county recommendations into a state plan for status offender programs and making statewide program funding decisions.

II. PLANNING DECISION MODEL

Details of the sixteen steps of the Planning Decision Model, outlined in the first chapter, are presented here. Having sixteen steps does not mean the process is complex. It means that an attempt has been made to break the process down into units which are manageable, easy to understand, and which allow the task force to progress systematically towards a logical conclusion. The sixteen-step model is summarized in Figure 4. Each of these steps will be discussed in detail to clarify the concepts being presented, the procedures which will be followed, and the results of using the model. The Field Consultant for each CBA Region has been extensively trained to assist the task force in working through the model. Answers to questions that have not been addressed in this workbook and solutions to problems which are unique for a particular county will be provided by the Field Consultant.

Track 1 - Steps 1-5.

In this first part of Track 1, the task force, as a whole, makes preliminary decisions concerning the priority of the needs it wants to address and the types of programs it wants to recommend for funding.

Step 1. Study the Statewide Needs of Status Offenders. These six needs were identified through the statewide needs assessment conducted in the fall of 1977. The underlying philosophy with regard to these needs is that if they are not met, they are contributing factors to status offender behavior in youth. Therefore, meeting these needs should make a major impact on reducing status offender behavior.

The County Data Report for each county provides information on twenty-four problems being experienced by status offenders and youth at risk in the county.² These problems are grouped by the six needs. For

²The Planning Decision Process is equally applicable to the status offender and youth at risk populations in the county. However, for the sake of convenience, only status offenders will usually be mentioned in further references.

the purposes of the Planning Decision Process, the needs are defined by the problems grouped under them. Meeting a need means correcting the problems associated with it. The presence of a problem indicates that the associated need is not being met. For example, a child's poor self-image implies that his need for mental health is not being met; or if a child is abused or neglected by his parents, it is strongly indicated that he is not in an appropriate living situation. In both these cases, relieving the problem helps to meet the need.

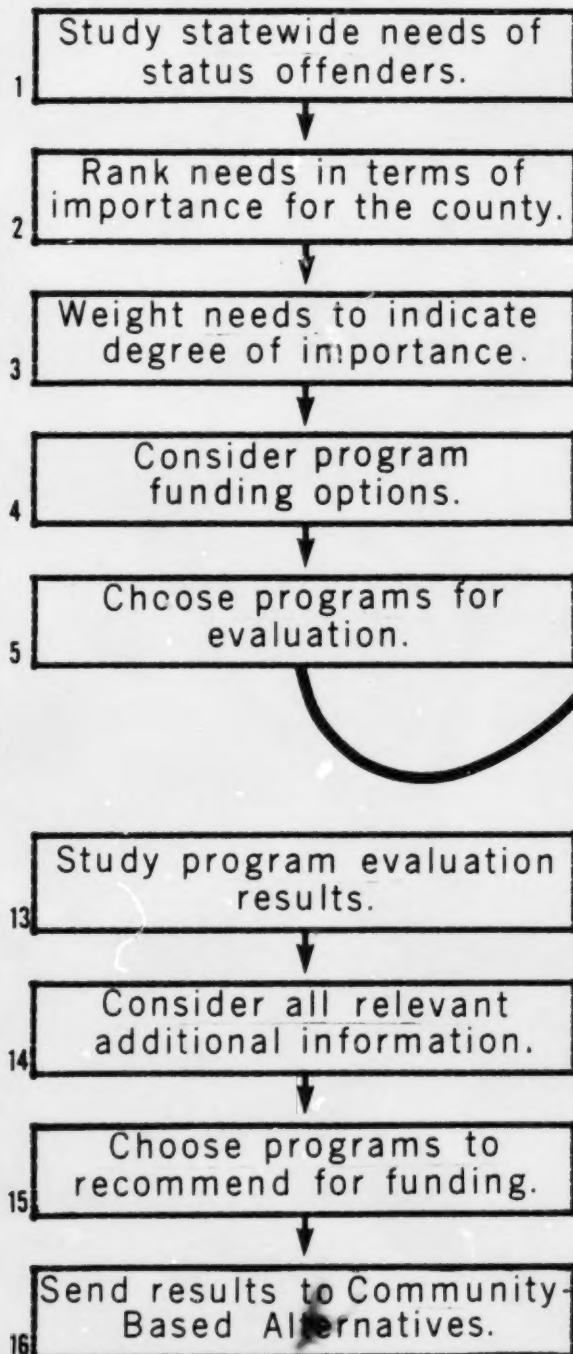
Each county will have a different situation with regard to the number of status offenders and youth at risk who are experiencing particular problems. Therefore, study of the County Data Report will provide each task force with a different perspective on the level of unmet need unique in its community. The unmet needs in a county indicate what areas prospective programs should be designed to address. Since information on unmet needs will be used by task forces in shaping their program funding recommendations, it is essential that all those involved in the Planning Decision Process have the same fundamental definitions of those needs. Task force members, county commissioners, service providers, the CBA Section of DHR, and others should all be working with a set of needs that share the same minimum definitions; the twenty-four problems, as objective indicators of unmet need, serve this purpose. Use of a consistent, minimum definition by all counties will allow county-by-county comparisons of funding recommendations. In addition, it will enable CBA to create a statewide picture of unmet program funding needs, as well as a unified plan for future funding priorities.

In order to make the process work, it is only necessary that a minimum definition of the needs be shared across the state. Any county can list additional problems under the six needs to more clearly define them. This procedure tailors the definitions to the county's unique perspective of status offender needs, and therefore impacts its decision-making on programs. The task force should realize, however, that no data will be available on these additional problems in the County Data Report.

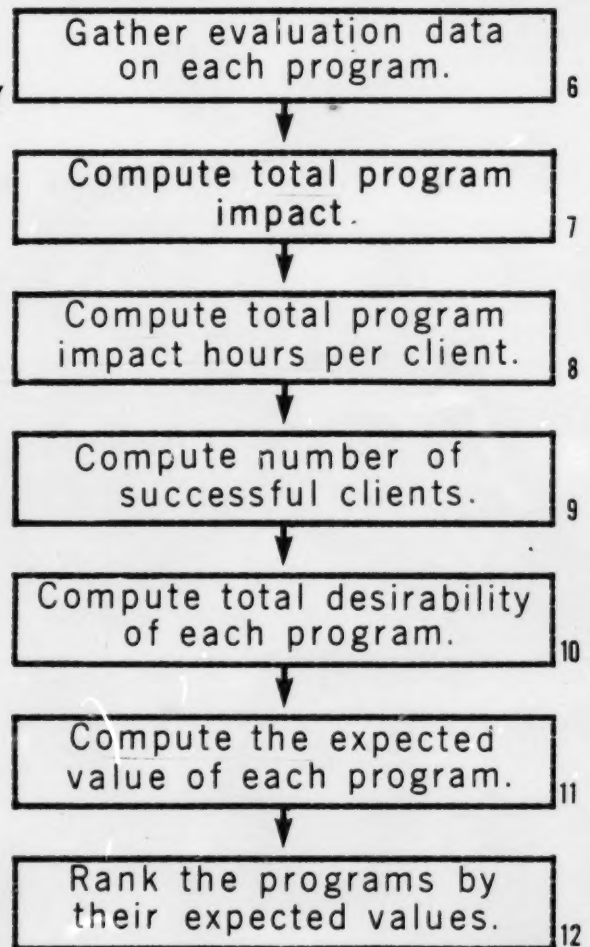
Step 2. Rank Needs in Terms of Importance for the County. It is the responsibility of each county task force to determine its priorities

STATUS OFFENDERS PLANNING DECISION MODEL

TRACK 1 - Full Task Force



TRACK 2 - Technical Committee



for meeting the six major needs of status offenders and youth at risk. To assign priorities to needs, the task force ranks them in terms of their importance to the county as contributing factors to status offender behavior.³ The needs which are most important for the county to meet in order to help reduce status offender behavior will be the top-ranked needs. The decisions on the ranking of the needs should be based on three different factors: needs assessment data, personal values, and group values.

The first factor is the information the task force has from the County Data Report: problems experienced by status offenders or youth at risk in the county indicate that a particular need is not being met. Evidence that a great many status offenders experience important problems might provide justification for making a particular need the most important one for the county. Care should be taken in using County Data Report information to assess the total unmet need in a county. It is not possible to determine either the total number or the average number of youth experiencing an unmet need in the county because of duplicative counting of youth across problems. Needs assessment data should simply be used to give a general indication of how serious an unmet need is for a county.

In addition to county needs assessment data, each community has its own unique set of values; it is vital to incorporate these values into the priorities of the needs. The other two factors on which the ranking of the needs should be based deal with these community values. First, the personal values of individual members of the task force with regard to these needs must be accounted for. Each task force representative should consider what he believes are the most important contributing factors to status offender behavior in his county. Another part of a task force member's responsibilities is to represent his group's values. Each member of the task force is a member of some group in the county: for example, a public service agency, the court system, the business community, or civic organizations. Those groups will each have a unique

³The details involved in steps 2 and 3, as well as the forms especially designed to facilitate ranking and weighting, will be provided by the appropriate CBA Field Consultant for the region.

perspective on the major contributing factors to status offender behavior which must be considered in ranking the needs. Individual values, group values, and the data from the needs assessment will be put together to create an individual, specific impression from each county about which needs are most important. This impression will be expressed in the ranking each task force member gives to the needs.

Step 3. Weight Needs to Indicate Degree of Importance... Ranking does not give sufficient information about the actual relationship among needs in a county: it is not enough to say that one need is more important than another. To make the Planning Decision Process work, the task force needs to know just how much more important one need is than another. The task force needs to assign to each need a weight, a number, which says, for example, that meeting the need for an appropriate living situation for this particular county is twice as important as meeting the need for recreation. The reason for this weighting is that, in this particular county, the unmet need for appropriate living situation is twice as important a contributing factor to status offender behavior in the county as is the unmet need for recreation. There is no information in the County Data Report that can assign these weights for the counties. The weighting sets the priorities for the county and sets the tone for the rest of the Planning Decision Process, since counties will want to fund programs which direct their efforts toward meeting the most important needs for that county. Weighting makes the Planning Decision Process unique to every county.

In these first three steps, the task force determines which needs of status offenders it wants the county's programs to meet. It also addresses the issue of whether some needs are more important than others. It could be that all needs are equally important. But in cases where they vary in importance, the task force decides just how much more important one need is than another. Only by precisely defining the degree of importance of each need will the task force be able meaningfully to incorporate community values into its decision-making process for funding status offender programs.

Step 4. Consider Program Funding Options. An investigation and evaluation of specific programs being considered for funding in the counties is a major part of the Planning Decision Process. Before the task

force can conduct this investigation, it needs to decide which programs or types of programs are worth the investment of the time and energy necessary to do a good evaluation. Help for making this decision can come from information in the County Data Report on twenty-one program types recommended for the status offenders and youth at risk in the county. This information can be used to narrow the possible range of program choices to a manageable size. By consulting the County Data Report and checking on programs which have been recommended for the status offenders in the county, program types for which there are very few possible clients could be dropped from further consideration. Programs which have had a high number of recommendations are probably good candidates for further investigation and evaluation.

Step 5. Choose Programs for Evaluation. Based on the decisions made in step 4, a list of specific programs or program types should be sent to the technical committee for them to investigate and evaluate. The twenty-one program types included in the County Data Report have been grouped into three major categories: treatment programs, crisis intervention programs, and prevention programs. At a minimum, the list of programs sent to the technical committee should include one program from each of the three categories. This listing ensures that the county at least takes into account all the basic components of a truly comprehensive continuum of alternative services for status offenders. When choosing programs for evaluation, task forces need to find a balance between a small enough number to keep the task manageable, and a large enough number of programs to make the upcoming planning decision meaningful. The greater the number of alternatives considered, the more the task force will be making real decisions. In order to get a large enough list of programs to evaluate, the task force will often have to take an active role in the process of publicizing and promoting its activities in the county.

Even if all programs are not funded, the evaluation data collected on each program helps to improve future planning on both the state and county level. By setting up a "shopping list," with the programs already assigned priorities, work can begin at the county level to plan for implementation next year. Data from all counties can be collected and summarized at the CBA central office to put together a picture of statewide program funding priorities for the future.

Track 2 - Steps 6-12

Steps 6 through 12 are completed by the technical committee of the task force. These steps include the collecting and arraying of the quantitative information which the full task force will consider in making its funding recommendations. The Service Resources Assessment Worksheet (SRAW), the Expected Value Worksheet (EVW), and half of the Final Planning Chart (FPC) are completed during these steps.

Step 6. Gather Evaluation Data on Each Program. The first step of track 2, gathering Service Resources Assessment (SRA) data, is explained in detail in the Service Resources Workbook, a companion document to the Planning Decision Workbook. In this step, the technical committee of the task force collects information on the present level of service for selected types of status offender programs; and information on the cost, capacity, impact on clients' needs, and average length of service of programs being considered for funding.

This information is the minimum required to enable programs to be compared with one another, both within a county and across the entire state. Task forces should continue to gather additional information if they have been doing so in the past. This process simply clarifies what information is going to be used by every participating county and the CBA central office. The information gathered on programs during the Service Resources Assessment, combined with data from the County Data Report, will be used in the next five steps of the Planning Decision Process.

Step 7. Compute Total Program Impact. Steps 7-11 of the status offender Planning Decision Model result in the completion of an Expected Value Worksheet (EVW) for each program the task force has decided to investigate for possible funding. Chapter III of the workbook includes a copy of the EVW, instructions for its completion, and detailed definitions of many of the terms used in the following steps. The sequence for calculating the expected value of a program is presented in Figure 5. This sequence will be followed by the technical committee.

In step 7, the task force computes the total program impact of each program being considered for funding. Total impact is computed based upon the impact of the program on each of the needs of status offenders determined in the Service Resources Assessment and the importance weight placed on each of the needs by the task force as documented in the Needs

Weighting Worksheet. (This worksheet will be supplied to each county by CBA Field Consultants.) Total program impact summarizes where a program is putting its effort in meeting the needs of status offenders, given the importance of those needs to the task force. The higher the total impact, the more closely the program is distributing its efforts in meeting the needs determined to be most important by the task force.

Step 8. Compute Total Program Impact Hours Per Program. In step 8, the total program impact is translated into total program impact hours per client by multiplying total program impact times the average number of service hours per client. This average is gathered during the Service Resources Assessment. This impact figure is an indicator of how much each program is addressing itself to the important needs of an individual status offender client.

Step 9. Compute Number of Successful Clients. In this step, the technical committee computes the estimated number of successful clients for each program during the proposed funding period. This figure is based upon the estimated effectiveness of the program, a percentage which is reported in the County Data Report for the state as a whole, and upon the number of clients to be served by the program as gathered in the SRA.

Step 10. Compute the Total Desirability of Each Program. The product of steps 8 and 9--the total program impact hours per client times the number of successful clients--is the total desirability of each program. The larger this figure, the more desirable the program is to the county: the more the program clearly delivers what the county wants in a status offender program.

Step 11. Compute the Expected Value of Each Program. Total desirability, divided by the total program cost, determines the expected value of each program. The mathematical formulas underlying these calculations can be found in the Appendix. The expected value reveals how much of what a county considers desirable in a program can be purchased for every dollar invested, and is the basic piece of information used to compare one program with another.

Step 12. Rank the Programs by Expected Value. When the task force has completed step 11, it ranks programs by their expected values on the Final Planning Chart (FPC).

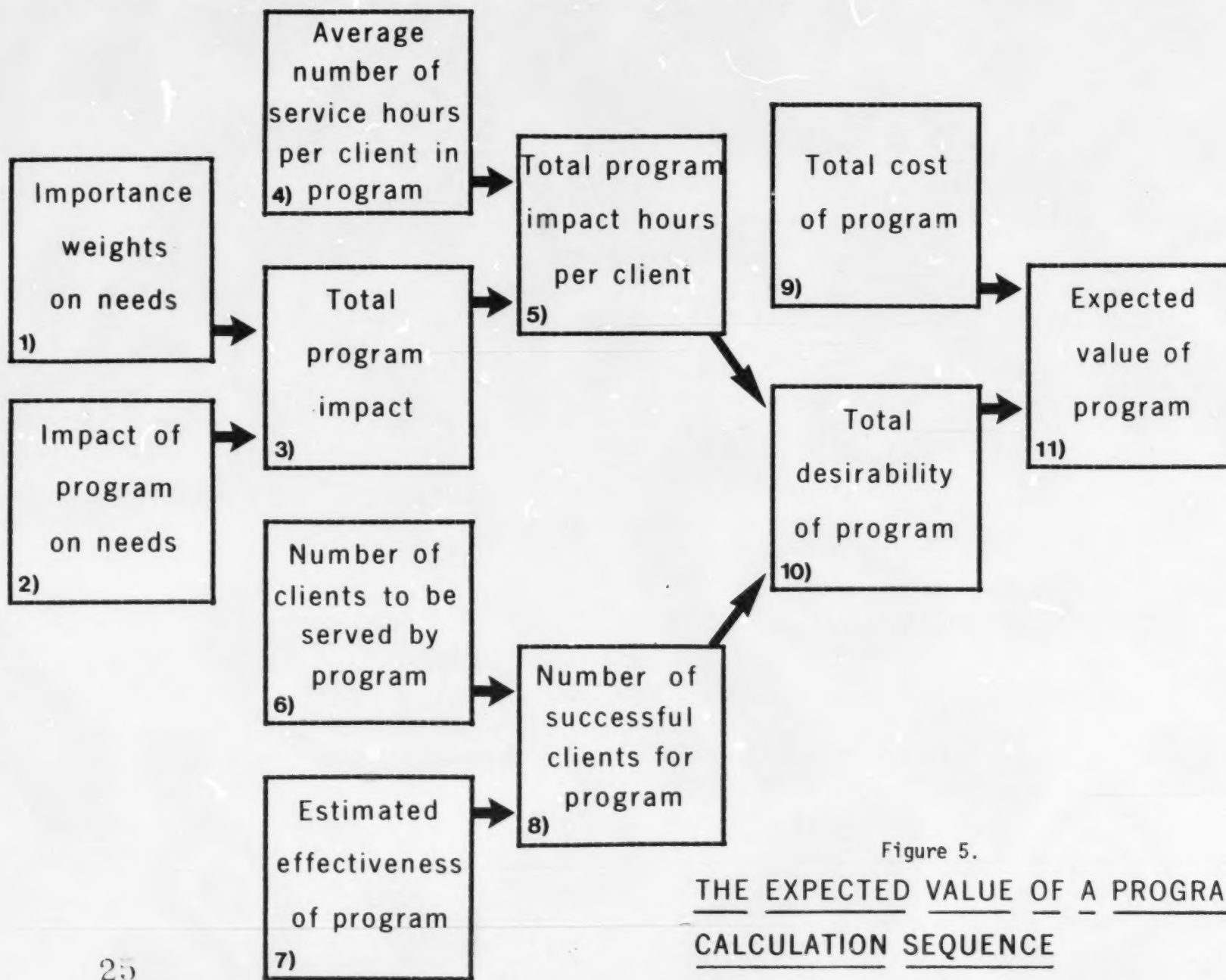


Figure 5.

THE EXPECTED VALUE OF A PROGRAM
CALCULATION SEQUENCE

The entire left side of the FPC is filled in and the information made available to the full task force in step 13. A copy of the FPC and instructions for its completion are in Chapter IV of this workbook. It is this information, the final summarization of evaluation data gathered on all considered programs, that can be used by CBA to lobby for increased money for community programs based on documented need.

Track 1 - Steps 13-16

The full task force is involved in completing the decision-making steps which comprise the final part of Track 1.

Step 13. Study Program Evaluation Results. The completed left side of the Final Planning Chart displays data to help the task force make final budget decisions in the final steps of the process. In step 13, the task force studies the data presented on the FPC to ensure that all members understand the results.

Step 14. Consider All Relevant Additional Information. During this step, task force members consider other factors which are not presented on the FPC, but that they believe are critical to decision-making. Initially, they should consider any political concerns which might be relevant in their county and which might override any data-based funding priorities. For example, if task force members know that the political decision makers in the county are adamantly opposed to or enthusiastically supportive of a program, they may want to alter their initial judgment based upon this very reasonable concern.

In addition, the task force may want its judgments to reflect program implementation considerations. If, for example, the task force knows that of two programs with similar expected values, one will be able to begin serving clients within three months of start-up and the other, six months, the task force might want to fund the program which can provide the quickest service to clients. Knowledge of other available sources of funds may restructure the task force's initial priorities for CBA funding.

Other considerations which might be important to a county are these:

1. Is there a possibility that the county could jointly fund a program with other counties?

2. Could program costs be reduced by: funding program for less than a full year; serving fewer clients; finding another funding source for part of the cost; or, using volunteers?
3. Can a program be redesigned to better fit the requirements of the county?
4. Could a proposed program's services be provided on a per client contract basis by another organization, thereby saving the county program start-up costs?
5. Is the professional experience and skill of the provider a consideration?
6. What future commitments are incurred in starting or supporting a program?
7. Are there programs which are alternatives to one another?

Data on the left side of the FPC and these pieces of relevant information should be considered by the task force in making decisions about the funding recommendations that they will enter on the right side of the Final Planning Chart.

Step 15. Choose Programs to Recommend for Funding. The task force fills in the right side of the FPC with its recommendations for CBA funding in the county. Task forces will most likely choose their programs from those listed on the left side of the chart.

The programs on the left side are arranged so that the task force can choose to fund programs from the top down until their entire allocation is budgeted. If one or more highly rated programs are too expensive, the task force would choose to fund a lower-rated but more affordable program.

Task forces may, however, want to include the other factors considered in step 14 in making their funding decisions. Additional sources of funding or county and state political considerations could influence their decisions. Each task force should provide documentation to CBA of the basis for its decisions. This "decision rule" by the county clarifies the other information, aside from the program's expected value, used in making the funding recommendations. It should be clear to the CBA Section why one program instead of another was chosen for funding.

Task forces are not required to recommend only those programs on the left side of the chart, nor only to recommend the highly rated

programs. For example, a task force may decide to base its decision solely upon each program's cost or number of clients.

Once the task force has decided on its recommendations, it should list the programs it wants to be funded on the right side of the Final Planning Chart and should complete that side of the chart with requested program and funding data. The contents on the right of the FPC should then be forwarded to the county commissioners for their approval.

Step 16. Send Results to Community-Based Alternatives. The Final Planning Chart and any explanatory documentation developed in steps 14 and 15 should be sent to the Community-Based Alternatives Field Consultant who will forward them to the CBA central office. The Department of Human Resources will make CBA funding allocations based upon task force and county commissioner recommendations. In addition, task force recommendations will be used to develop a statewide status offender program plan. These recommendations will also be incorporated into requests to the legislature for future CBA funding.

The Community-Based Alternatives Field Consultants will serve as task force liaisons to the CBA Section of DHR keeping the counties aware of allocation schedules, and any further information needed.

III. INSTRUCTIONS: EXPECTED VALUE WORKSHEET

The purpose of the Expected Value Worksheet (EVW) [Figure 6] is to enable the local task force to summarize all the information it has gathered about a particular program. Since each program under consideration for funding will have an EVW completed on it, the same information, in the same format, will be available for every program, thereby making comparisons among programs feasible and meaningful.

Summary of Worksheet Content

A short explanation follows for each item on the EVW. Detailed procedures for actually completing the form are at the end of this chapter.

Program Type. Almost every program being considered for funding will fall within one of the twenty-one program types listed and defined in the Service Resources Workbook (SRW). Programs which do not fit into these program types will be listed by their program names.

Provider Name. The name of the agency or organization who will be administering the program and to whom the funds will be allocated.

Need Importance Weight. The weights assigned by the task force to each of the six needs to be met for status offenders which indicate how much more important each is than another.

Program Impact. The percent of a program's efforts, activities, or resources that is directed towards meeting each of the six main needs of status offenders. These figures reveal where the service provider believes his particular program will most impact the meeting of status offender needs.

Weighted Program Impact. The combination of a program's percent of impact on a need and the importance weight of that need as assigned by the task force reveals whether or not a service provider is putting the major stress of his program's efforts, activities, or resources on the needs which are most important to the task force.

Total Program Impact. This figure summarizes a program's total impact on the needs of status offenders, taking into consideration the importance of those needs to the task force. It is the first step in

summarizing how much the program is addressing itself to the important needs of a county.

Average Number of Service Hours Per Client. Every program delivers a certain number of hours of service to each client it serves during the funding period. The number of hours that an average client participates in the program during that period is a second indicator of the amount or degree of impact that program is going to have in meeting the needs of status offenders.

Total Program Impact Hours Per Client. The combination of the two indicators of the type (total program impact) and amount (average number of service hours per client) of impact a program has on status offender needs reveals how much the program is addressing itself to the important needs in the county. This amount is expressed in units (impact hours per client) which allow for direct comparison of one program to another.

Total Program Demand. This figure is the estimated total number of status offenders for whom the particular program type has been recommended, as revealed by the statewide needs assessment and documented in the County Data Report. However, this figure does not take into account whether or not these recommended status offenders are currently being served by such a program type.

Number of Status Offenders Currently Served. In any particular county there will be a certain number of status offenders who are currently being served by programs of the type listed in the County Data Report. Since the interest is to fund programs to meet the needs of status offenders who are not being served by existing programs, it is important to determine how many status offenders are currently in county programs of the type being investigated.

Actual Program Demand. This figure indicates the number of status offenders who could potentially benefit from the program being considered for funding. It is the difference between the total program demand and the number of status offenders currently being served by programs of the same type in the county.

Planned Program Capacity for Funding Period. This figure is an indication of the number of status offenders that a particular program expects to handle during the funding period under consideration. It may be more or less than the actual program demand in the county.

Figure 6. EXPECTED VALUE WORKSHEET

Expected Value Calculations for Program Type: _____

Provider Name: _____

Need	Need Importance Weight		Program Impact		Weighted Program Impact
1. Accept. Social and Interpersonal Values	a. _____	x	b. _____	=	c. _____
2. Appropriate Education	a. _____	x	b. _____	=	c. _____
3. Appropriate Living Situation	a. _____	x	b. _____	=	c. _____
4. Mental Health	a. _____	x	b. _____	=	c. _____
5. Physical Health	a. _____	x	b. _____	=	c. _____
6. Recreation	a. _____	x	b. _____	=	c. _____
					7. _____
					8. _____
					9. _____
				Total Program Impact	Average # of Service Hrs/Client
					Total Program Impact Hrs/Client (rounded off)
10. _____	-	11. _____	=	12. _____	or
Total Program Demand (rounded off)		# of Status Offenders Currently Served		Actual Program Demand	(which-ever is lower)
				Planned Program Capacity For Funding Period	
				# of Clients to be Served by Program	
				Estimated Program Effectiveness	
				Estimated # of Successful Clients (rounded off)	
16. _____	x	9. _____	=	17. _____	+
Estimated # of Successful Clients		Total Program Impact Hrs/Client		Total Program Desirability	
				Total Program Cost	
				Expected Program Value (rounded to two decimal places)	

Number of Clients to be Served by Program. Since a county has only a limited amount of money to use for funding status offender programs, it will probably not want to invest scarce resources in programs which have not realistically estimated the number of clients they are likely to serve. If the actual demand for a program is distinctly less than the planned capacity for that program, the county would be spending funds for nonexistent clients.

Estimated Program Effectiveness. Based on data gathered in the statewide status offender needs assessment, program effectiveness scores have been estimated for each of the twenty-one program types on which data are reported. These scores indicate the percentage of successful clients that a program of that type is likely to have, as compared to the other program types on the list. Like EPA gas mileage figures, these scores should be used for comparison purposes only, and not as an accurate estimate of the actual percentage of successful clients the program will have.

Number of Successful Clients. Given the number of clients to be served by a program and that program's effectiveness score, it is possible to calculate the estimated number of successful clients for that program during the funding period under consideration. In making its final funding decisions, a task force should consider not only how many clients would be served by a particular program but also how many successful clients that program will deliver for the county.

Total Program Desirability. Combining the amount of impact a program will make on each of its clients (total program impact hours per client) with the estimated number of successful clients that the program can be expected to produce reveals just how desirable that program is to the county. Programs which serve a large number of clients successfully and deliver a great deal of impact on the important needs of those clients are more desirable than programs which serve few clients successfully or make little impact on the important needs.

Total Program Cost. This amount is an estimate of the cost of operating a specified program during the funding period.

Expected Program Value. Neither the desirability nor the total cost of a program provides sufficient information for making quality funding decisions. The task force needs to know how these two important factors

interact. What is required in a program is the proper combination of desirability and cost. The expected value of a program indicates the amount the county gets of what it has determined to be desirable in a program for every dollar it spends on that program.

Instructions for Completing the Expected Value Worksheet (EVW)

The Expected Value Worksheet (Figure 6) displays the calculations necessary to determine the expected value for a service program or program type. An Expected Value Worksheet should be completed for each Service Resources Assessment Worksheet (SRAW) completed. Figure 7 shows a sample EVW already filled out with data.

An explanation of the source of each EVW entry follows:

Expected Value Calculations For Each Program Type. Enter the program type from Item 1 of the appropriate SRAW.

Provider Name. Enter the provider name from Item 2 of the SRAW.

Items 1-6 a--Need Importance Weight. Enter the figures which were determined in step 3 of the Planning Decision Process for needs 1-6 and included on the Needs Weighting Worksheet. If one or more needs are deleted by the task force, do not fill in information on those needs.

Item 1-6b--Program Impact. Fill in the impact on needs score from Item 4 of the SRAW for each need.

Item 1-6c--Weighted Program Impact. Multiply the need importance weight (Items 1-6a) times the program impact for each need (Items 1-6b).

Item 7--Total Program Impact. Add together Items 1-6c of the EVW.

Item 8--Average Number of Service Hours Per Client. Enter the average number of service hours per client from Item 9 of the SRAW.

Item 9--Total Program Impact Hours Per Client. Multiply Item 7 times Item 8. Round off product to nearest whole number.

Item 10--Total Program Demand. For the program type listed at the top of the EVW, calculate Item 10 by multiplying the "percent receiving program recommendation" in the appropriate County Data Report, times the number of status offenders in the county. Round the product to the nearest whole number.

Item 11--Number of Status Offenders Currently Served. Enter the total in Item 12 from the SRAW and enter the result.

Item 12--Actual Program Demand. Subtract Item 11 from Item 10.

Item 13--Planned Program Capacity for the Funding Period. Enter either Item 6b or Item 7 or Item 8a, b, or c from the SRAW. Data for only one of these items should appear in the SRAW, depending on whether the program is new, or an expansion, or continuation of an existing program.

Item 14--Number of Clients to be Served by Program. Enter Item 12 of the EVW if it is lower than Item 13. Enter Item 13 of the EVW if it is lower than Item 12.

Item 15--Estimated Program Effectiveness. Enter the Estimated Program Effectiveness score on page 10 in the County Data Report for the program type listed at the top of the EVW.

Item 16--Estimated Number of Successful Clients. Multiply Item 14 times Item 15. Round the product off to the nearest whole number.

Item 17--Total Program Desirability. Multiply Item 16 times Item 9. Round the product off to the nearest whole number.

Item 18--Total Program Cost. Enter Item 10 of the SRAW.

Item 19--Expected Program Value. Divide Item 17 by Item 18. This quotient should be rounded off to two decimal places.

Figure 7. EXPECTED VALUE WORKSHEET

Expected Value Calculations for Program Type: Parenting Skills Education

Provider Name: Jefferson County Mental Health Center

Need	Need Importance Weight		Program Impact		Weighted Program Impact
1. Accept. Social and Interpersonal Values	a. <u>25</u>	x	b. <u>.10</u>	=	c. <u>2.5</u>
2. Appropriate Education	a. <u>26</u>	x	b. <u>.00</u>	=	c. <u>.0</u>
3. Appropriate Living Situation	a. <u>28</u>	x	b. <u>.70</u>	=	c. <u>19.6</u>
4. Mental Health	a. <u>9</u>	x	b. <u>.20</u>	=	c. <u>1.8</u>
5. Physical Health	a. <u>3</u>	x	b. <u>.00</u>	=	c. <u>.0</u>
5. Recreation	a. <u>9</u>	x	b. <u>.00</u>	=	c. <u>.0</u>

7. 23.9 x 8. 52 = 9. 1243 .
 Total Program Impact Average # of Service Hrs/Client Total Program Impact Hrs/Client (rounded off)

10. 64 - 11. 15 = 12. 49 . or 13. 60 . = 14. 49 x 15. .77 = 16. 38 .
 Total Program Demand (rounded off) # of Status Offenders Currently Served Actual Program Demand (which-ever is lower) Planned Program Capacity For Funding Period # of Clients to be Served by Program Estimated Program Effectiveness Estimated # of Successful Clients (rounded off)

6. 38 x 9. 1243 = 17. 47,234 + 18. \$7,400 = 19. 6.38 .
 Estimated # of Successful Clients Total Program Impact Hrs/Client Total Program Desirability Total Program Cost Expected Program Value (rounded to two decimal places)

IV. INSTRUCTIONS: FINAL PLANNING CHART

The purpose of the Final Planning Chart (Figure 8) is to assist the local task force in selecting community-based programs that best fit the needs and available resources in its area. It presents, in summary form, the major variables that need to be considered in choosing programs for funding. These variables are listed on the left side of the chart. Final task force funding recommendations for each program are to be listed on the right side.

Summary of Chart Content

A short explanation follows for each variable on the chart. The information for the left side of the chart comes from completed EVWs and SRAWs.

Programs. Each program being considered by the county should be listed in order of priority as determined by its expected value, with highest valued programs first.

Expected Value. This figure is calculated for each program using the Expected Value Worksheet. The task force is strongly encouraged to use this factor as the foremost criterion when making funding decisions, since it incorporates all major quantifiable variables involved in program selection.

Total Desirability. All variables except total program cost are combined in this figure.

Planned Program Capacity. Program capacity is an indication of the number of status offenders or youth at risk that the program can handle during the funding period.

Actual Program Demand. This figure indicates the estimated number of status offenders or youth at risk that could potentially benefit from the specific community-based program.

Total Program Cost. This amount is an estimate of the cost of operating the specified program during the funding period.

CBA Funding Request. This figure is the amount of money that the service provider is requesting from CBA. If other sources of funding are involved, this amount might be considerably different from the total program cost.

Total Task Force Budget for Funding: CBA, Other. These two amounts indicate the assured funds the task force has to work with when making program recommendations. The other funds will include local county match of CBA funds and contributions for agencies, foundations, and similar sources.

The right side of the Final Planning Chart is to be completed after the programs to be recommended for CBA funding have been selected by the task force. The cost of each program is divided among possible funding sources--CBA, county, or other. There are also columns indicating the total amount of funding and the number of clients served by the program.

Instructions for Completing the Final Planning Chart (FPC)

All variables listed on the left side of the chart can be transferred directly from each program's Expected Value Worksheet or Service Resources Assessment Worksheet. Below is a list of the variables on the Final Planning Chart and their corresponding position on the two worksheets. A filled in sample chart is shown in Figure 9.

<u>Final Planning Chart</u>	<u>Expected Value Worksheet</u>
Expected Value	# 19
Total Desirability	# 17
Planned Program Capacity	# 13
Actual Program Demand	# 12
Total Program Cost	# 18
	<u>Service Resources Assessment Worksheet</u>
CBA Funding Request	# 11

The right side of the chart provides a description of the task force's budget for funding community-based programs.

Budget. The total task force budget amount is placed in the top right corner of the chart. These figures represent the total amount available to the task force from CBA and other sources for funding community-based programs during the specified funding period.

Programs. Each program actually chosen for funding is listed in the first column, in priority order as determined by the task force.

Funding Level. The next three columns provide a breakdown of the dollar amounts actually available from all funding sources for each program. The first column lists funds to be received from the Community-

Figure 8. FINAL PLANNING CHART

Total Task Force CBA \$ _____
 Budget for Funding: Other \$ _____

Programs	Expected Value	Total Desirability	Number of Clients		Total Program Cost	CBA Funding Request		Programs	Funding Level			Total Funding	Number Served
			Planned Program Capacity	Actual Program Demand					CBA	County	Other		
1.								1.					
2.								2.					
3.								3.					
4.								4.					
5.								5.					
6.								6.					
7.								7.					
8.								8.					
9.								9.					
10.								10.					
11.								11.					
12.								12.					
13.								13.					
14.								14.					
15.								15.					
16.								16.					35
17.								17.					
18.								18.					42

Based Alternatives Section of the North Carolina Department of Human Resources. The next column shows funds available from the individual county, whether through matching funds or other county government sources. The remaining column lists amounts from all other funding sources, such as federal funds, private sources, etc. There need not be figures in each column, but there must be an amount listed in at least one column for each program. The CBA Field Consultants will help counties calculate the amounts in these columns using county-match formulas developed in the CBA central office.

Total Funding. This column shows the total funds available for each program. The amount in this column should represent the sum of the amounts in the previous three columns. It is not necessary, however, that total funding be equal to total program cost listed on the left side of the chart, since not all programs will be funded at their full capacity. Total funding represents the amount that the task force believes should be allocated to a specific program. The sum of all figures in the total funding column may exceed the total task force budget amount at the top of the sheet.

Number Served. This column lists the actual number of status offenders or youth at risk that can be served for the dollar amount listed in the previous column. Because total funding does not always equal total program cost, the number of clients served is not necessarily equal to planned program capacity or to actual program demand. Number served represents only the number of clients that the task force feels can be adequately served by a program with the funding amount actually allocated to it.

Figure 9
FINAL PLANNING CHART

Total Task Force CBA \$ 17,500
Budget for Funding: Other \$ 10,500

Programs	Expected Value	Total Desirability	Number of Clients		Total Program Cost	CBA Funding Request	Programs	Funding Level			Total Funding	Number Served
			Planned Program Capacity	Actual Program Demand				CBA	County	Other		
1. Special Foster Care	48.15	785,624	10	27	\$15,900	\$ 9,000	1. Special Foster Care	\$6,923	\$2,077	\$6,900	\$15,900	10
2. Recreation	17.95	323,035	30	43	\$18,000	\$18,000	2. Remedial Education	\$5,469	\$1,641	\$10,690	\$18,000	15
3. Remedial Education	15.88	285,768	15	36	\$18,000	\$12,000	3. Parenting Skills Ed.	\$2,846	\$ 854		\$ 3,700	30
4. Group Home	15.11	1,148,436	14	28	\$76,000	\$76,000	4. Temporary Foster Care	\$2,262	\$ 678		\$ 2,940	10
5. Temporary Shelter Care	6.51	32,528	17	10	\$ 4,998	\$ 4,998	5.					
6. Parenting Skills Ed.	6.38	47,234	60	49	\$ 7,400	\$ 7,400	6.					
7. Adult Volunteers	4.69	77,322	60	55	\$16,500	\$10,000	7.					
8. Counseling	2.99	32,918	31	33	\$11,000	\$11,000	8.					
9.							9.					
10.							10.					
11.							11.					
12.							12.					
13.							13.					
14.							14.					
15.							15.					
16.							16.					
17.							17.					
18.							18.					

V. FINAL DECISION-MAKING

Alternatives/Recommendations

The left side of the Final Planning Chart presents the service program funding priorities established by the task force using the Planning Decision Process. The right side displays the task forces decisions for actual program funding.

The planning process is designed so that the programs in the right side should be drawn from the top affordable programs listed in the left side. However, counties may present a somewhat different array of programs in the right side. If other sources of funding are available for high priority programs, the task force may want to delete these programs from its list of programs to fund or may want to reduce the level of funding they recommend. A task force may decide to base its recommendations on only one piece of information in the left section--cost, total desirability, or planned program capacity.

It is probable that a task force will present recommendations in the right side that are not based solely on information presented in the left. Such a situation will arise if a task force incorporated any crucial political or implementation considerations into the planning process during step 14.

A Plan for the Future

The Final Planning Chart presents data and information which can be used by the task force throughout the planning year.

The task force may want to seek other sources of funding for high priority programs which do not receive CBA funding. The data on the Final Planning Chart, the Expected Value Worksheet, and Service Resources Assessment Worksheet can be used as supporting documentation for program proposals to other funding agencies. The task force may also want to use the information gathered and developed during the planning process to develop community support for new programs or awareness of program need.

If a task force conducts the Planning Decision Process next funding year, it may want to compare its recommendations for the two years and determine the cause of any differences. Awareness of yearly fluctuations can give the task force insight into the changing state of status offender programs and needs. A task force could respond to unreasonable fluctuations by modifying some of the subjective considerations that were used in the planning process--importance weights on needs or additional political and implementation information.

For some counties, differences in program priorities could be directly related to the task force's adapting the improved data collection techniques outlined in the final section of the Service Resources Workbook.

APPENDIX

FORMULAS FOR COMPUTING EXPECTED VALUE OF PROGRAMS

$$V_j = \frac{D_j}{C_j}$$

$$D_j = (S_j) (H_j)$$

$$S_j = (N_j E_j)$$

$$H_j = (A_j I_j)$$

$$I_j = \sum_{i=1}^n W_i P_{ij}$$

$$V_j = \frac{[N_j E_j][A_j (\sum_{i=1}^n W_i P_{ij})]}{C_j}$$

V_j = Expected value of program j

D_j = Total desirability of program j

C_j = Total cost of program j

S_j = Number of successful clients for program j

N_j = Number of clients to be served by program j

E_j = Estimated effectiveness of program j (0-1.0)

H_j = Total program j impact hours per client

A_j = Average number of service hours per client in program j

I_j = Weighted program j impact

W_i = Importance weight of need i (0-100)

P_{ij} = Impact of program j on need i (0-1.0)